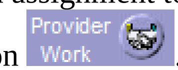
Private Provider Background Check Imaging

Note: In order to add images, an assignment to the provider is not needed. However, additional security is needed for the Imaging Search page.

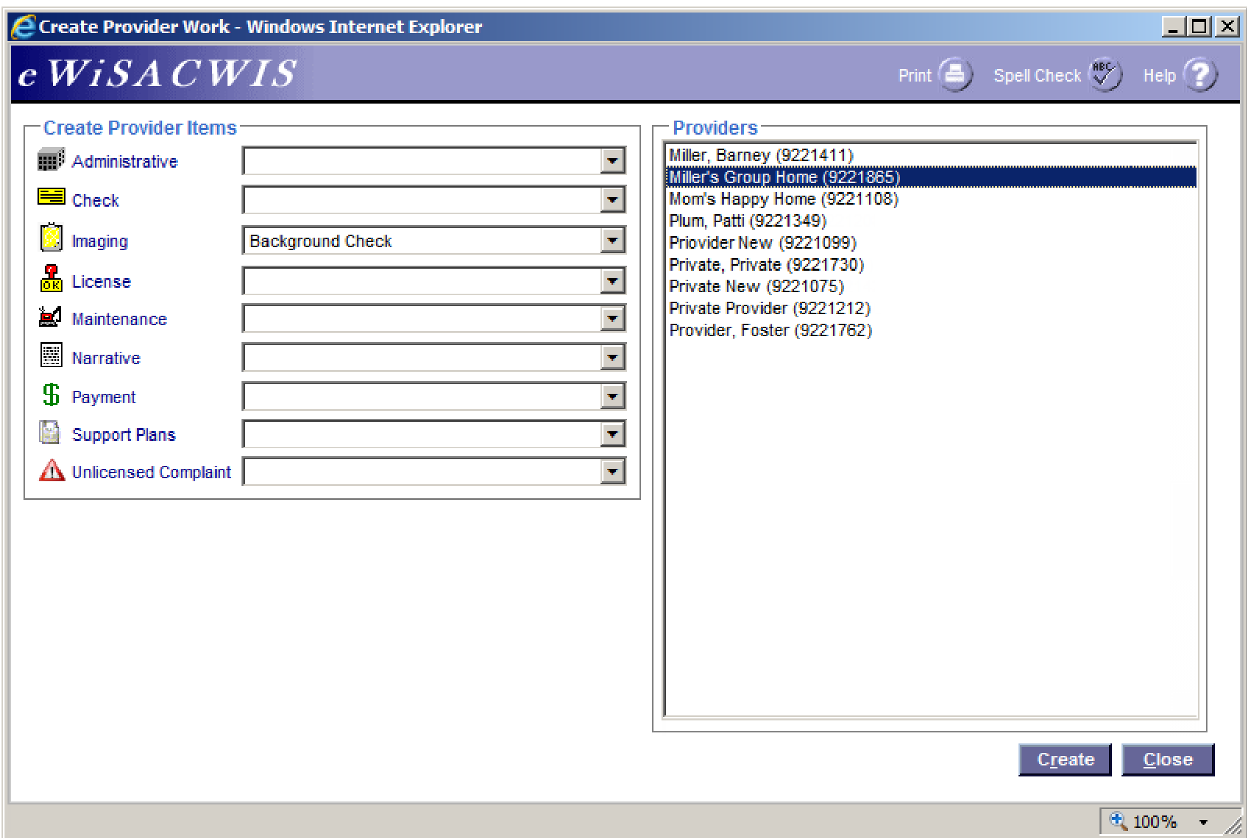
Note: Please see the Imaging Provider User Guide on how to add other imaging documents to providers.

If you have an assignment to the provider:

1. There are 2 ways to create a background check with an assignment to the provider.

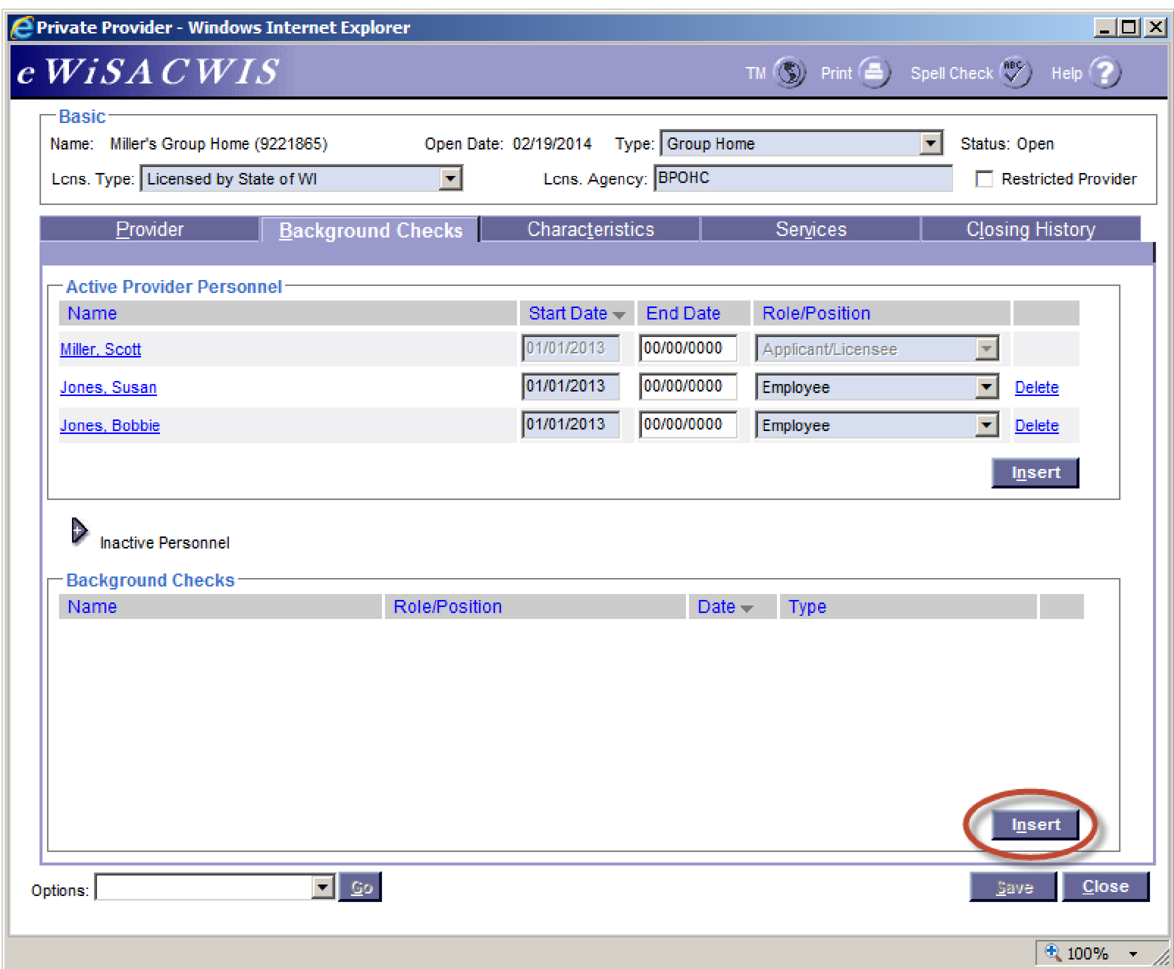
   a. From your desktop, click on the Provider Work icon 

. This will open the Create Provider Work page. On the Create Provider Work page, select ‘Background Check’ from the Imaging drop-down, select the Provider, and click Create. This will open the Organization Background Check page.



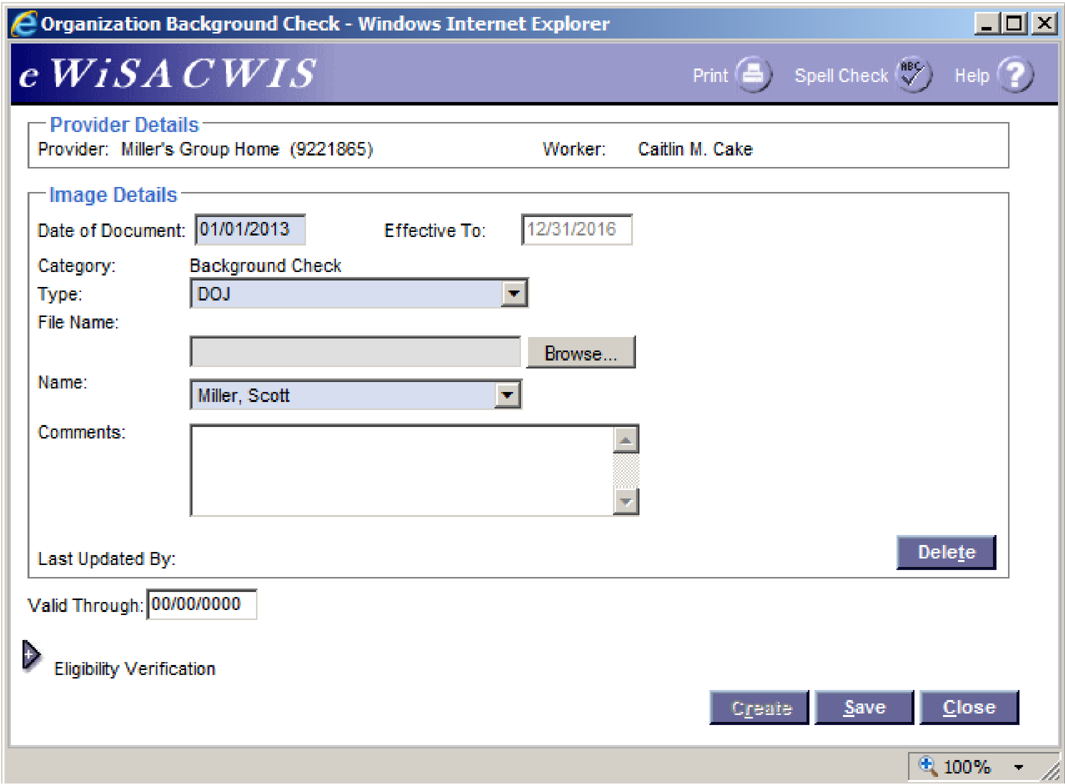
b. From your desktop, click on the Provider's name to open the Private Provider page.

Click on the Background Checks tab, and click Insert in the Background Checks group box. This will open the Organization Background Check page.

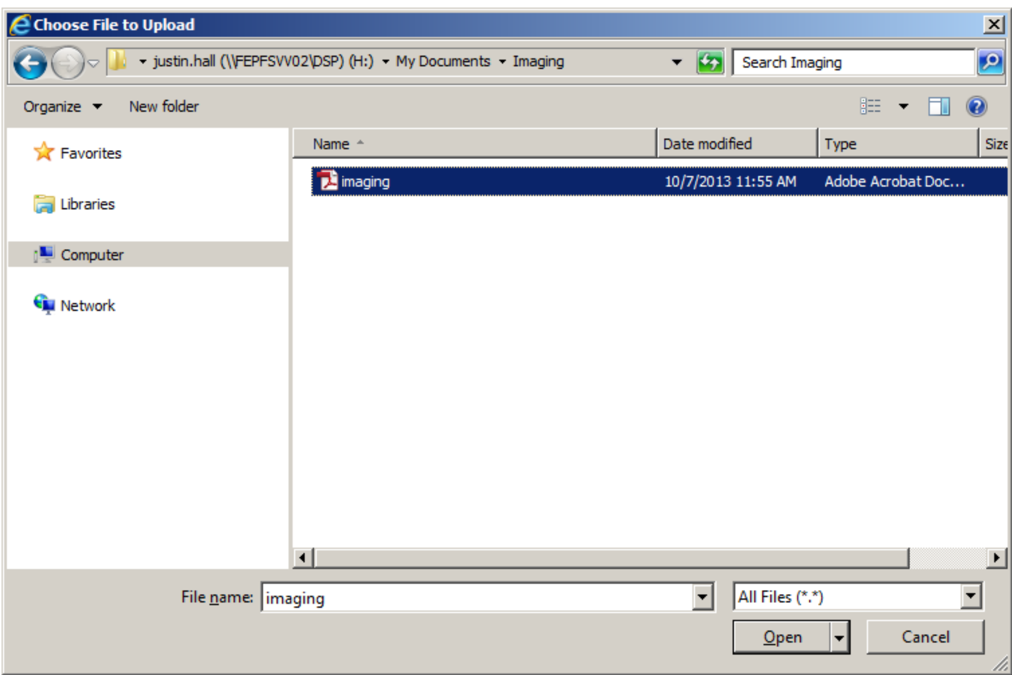


2. On the Organization Background Check page, enter the Date of Document. If applicable, enter the Effective To date. Select the Type of background check. To attach a previously scanned document, select the Browse button. This will open the Choose File to Upload pop-up page.

   Note: If the Type is DOJ or IBIS, the Effective To date will pre-fill to 4 years from the Date of Document and will not be editable.



3. Select the file from the appropriate location/folder. Then click the Open button.



   Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, xls, tiff, tif, and pdf and cannot exceed 10 MB.

4. You can view the document by selecting the View hyperlink next to the File Name.

5. In the Name drop-down, select the name of whom the background check is for. Enter any comments in the Comments field.

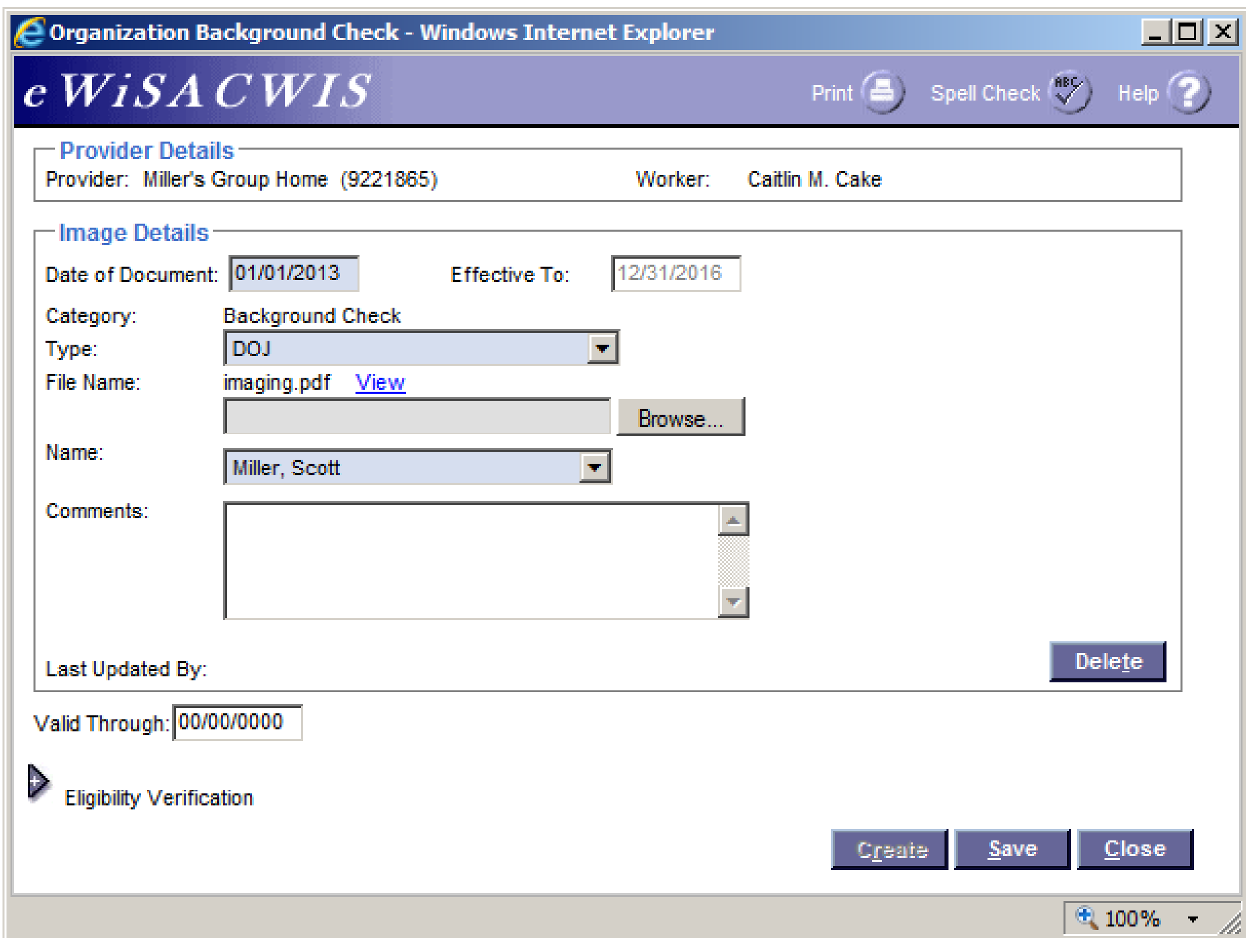
6. The Valid Through date identifies when a background check is no longer applicable or effective when the date is prior to the Effective To date. The date is used in revoked or closed license scenarios.

7. When all required fields have been completed, click Save. After clicking Save, your name will appear in the Last Updated By field.

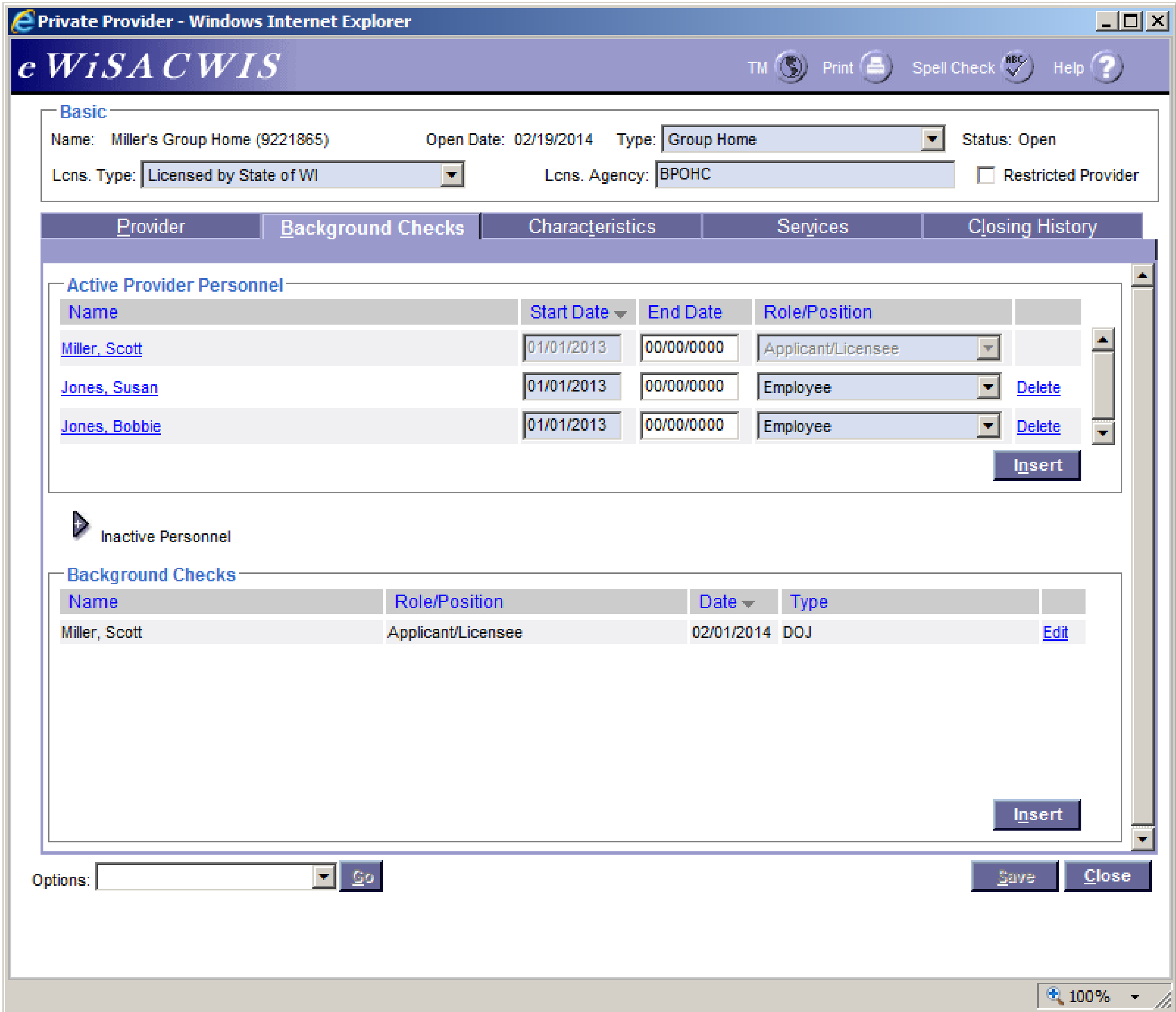
8. If the background check has been added to the wrong provider, click Delete to remove the image. If the background check has been added to the wrong person, you can select a different name from the name drop-down.

9. To create another background check for a person associated with this provider, click the Create button.

10. Click Close when done.

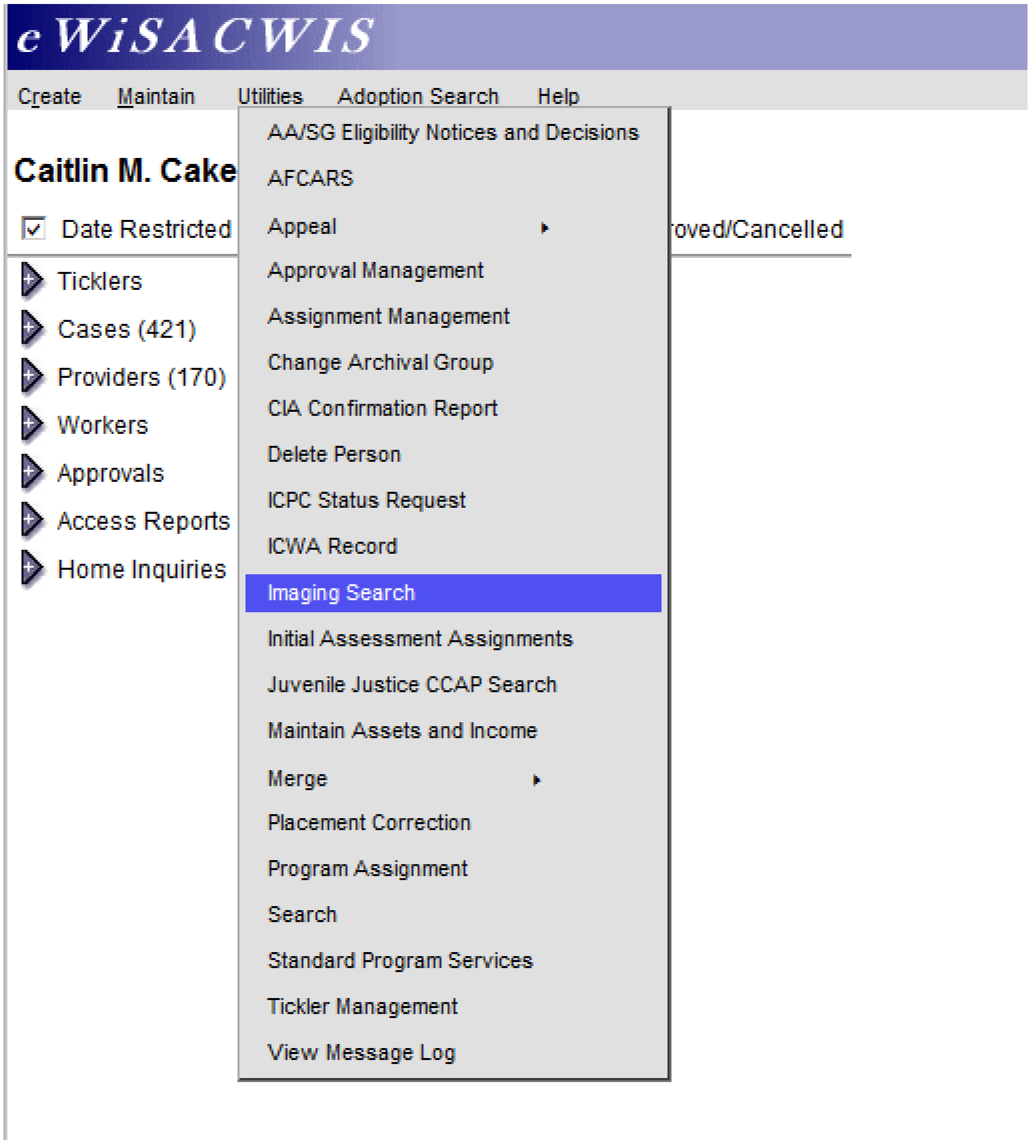


11. If you accessed the Organization Background Check page via the Private Provider page, you will return to the Private Provider page. The page will display all background checks for the Applicant/Licensee and Employees. To view or modify the imaging page, click the Edit hyperlink. This will open the Organization Background Check page.

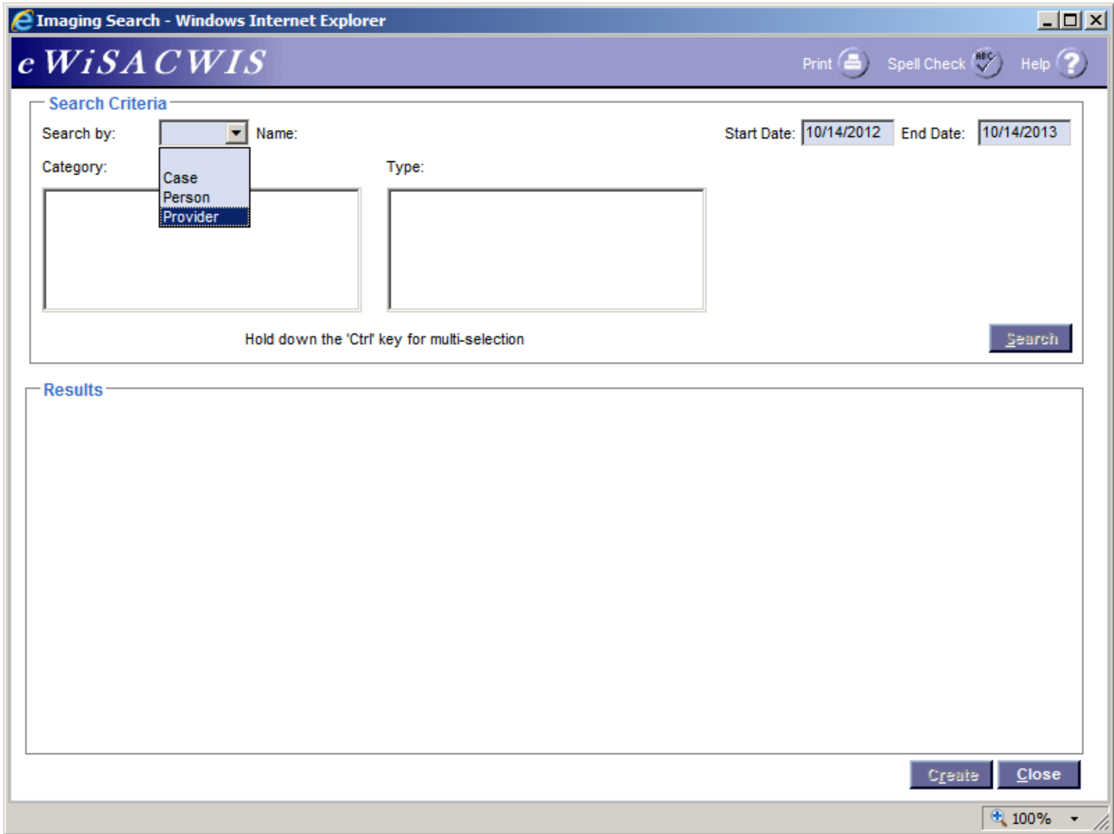


If you do not have an assignment to the provider:

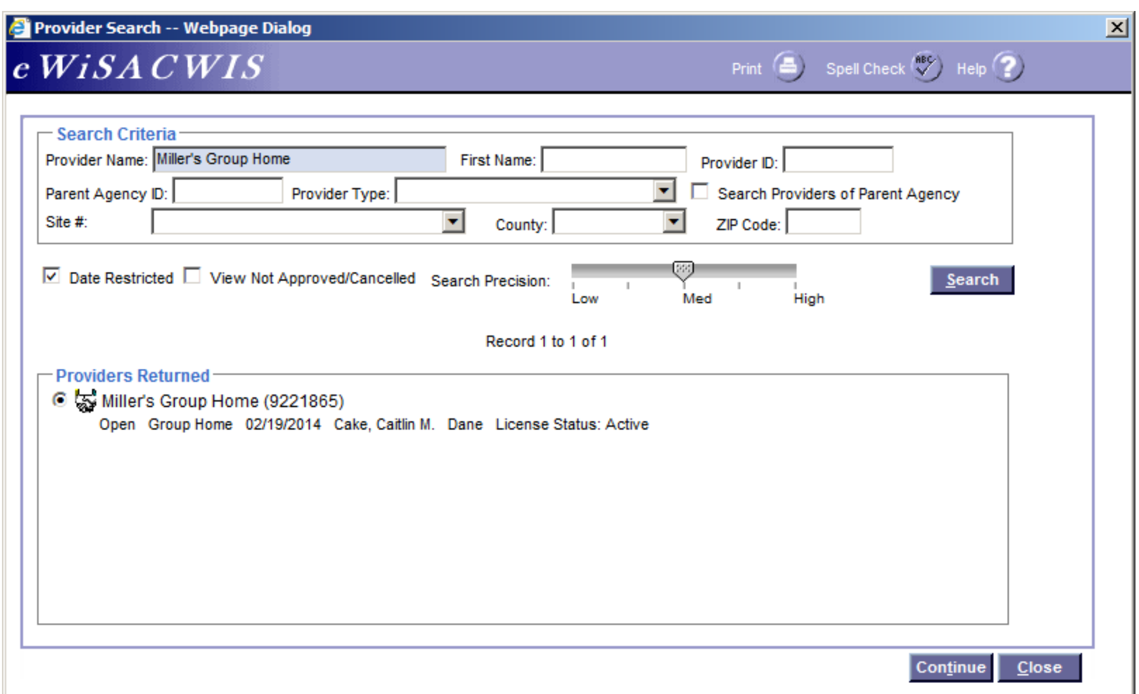
1. From the desktop, click Utilities > Imaging Search. This will open the Imaging Search page.



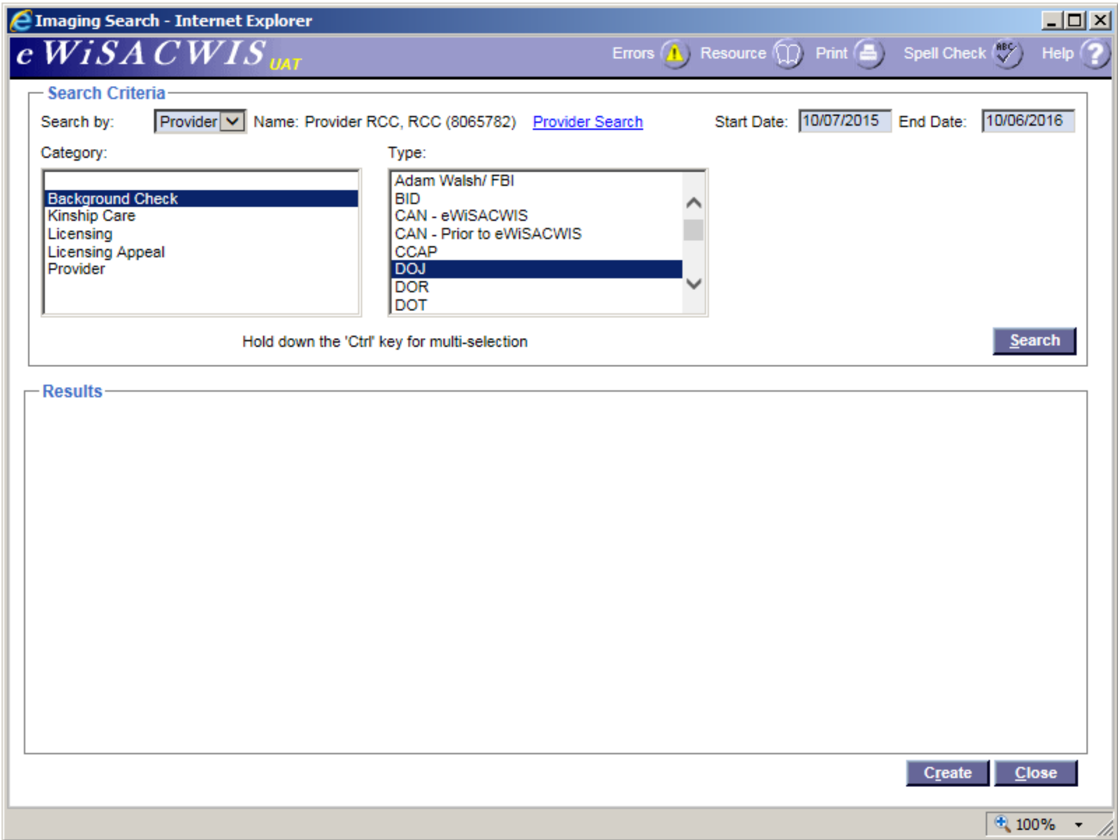
2. On the Imaging Search page, select Provider from the Search by drop-down. This will open the Provider Search page.



3. On the Provider Search page, enter the Provider Name or Provider ID and click Search. In the Providers Returned group box, select the radio button for the correct provider and click Continue.

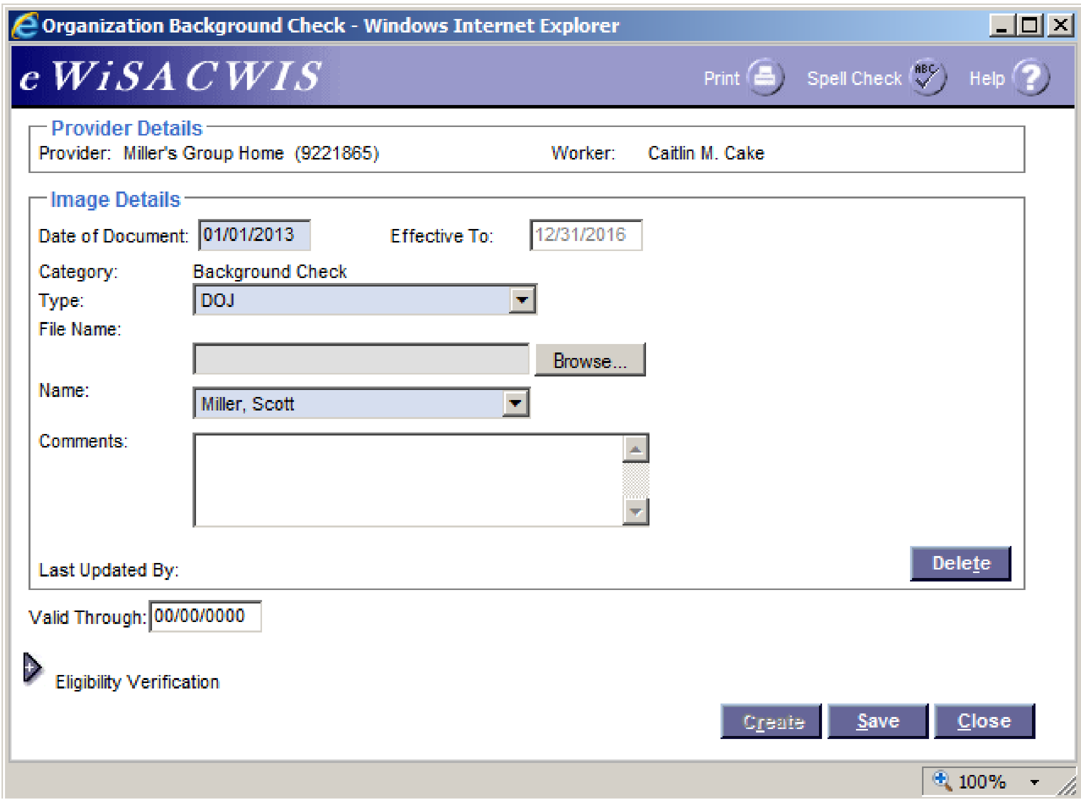


4. This will bring you back to the Imaging Search page. The page will now display all documents for the provider. The results will display all documents from the past year, unless the Start Date and End Date have been updated. To add a document, select the ‘Background Check’ Category and select the appropriate Type of background check. Click Create.

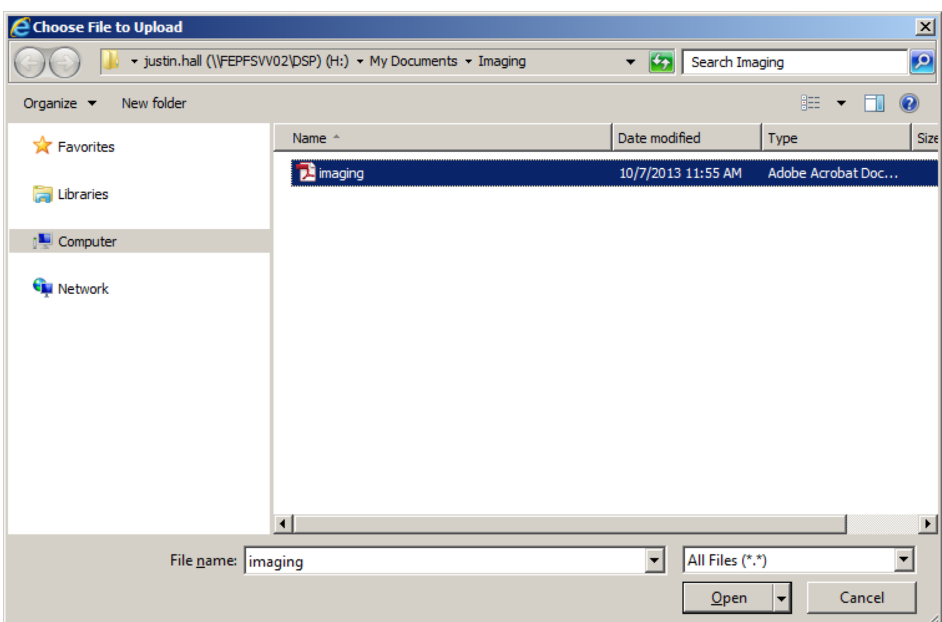


5. On the Organization Background Check page, enter the Date of Document. If applicable, enter the Effective To date. Select the Type of background check. To attach a previously scanned document, select the Browse button. This will open the Choose File to Upload pop-up page.

   Note: If the Type is DOJ or IBIS, the Effective To date will pre-fill to 4 years from the Date of Document and will not be editable.



6. Select the file from the appropriate location/folder. Then click the Open button.



   Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, xls, tiff, tif, and pdf and cannot exceed 10 MB.

7. You can view the document by selecting the View hyperlink next to the File Name.

8. In the Name drop-down, select the name of whom the background check is for. Enter any comments in the Comments field.

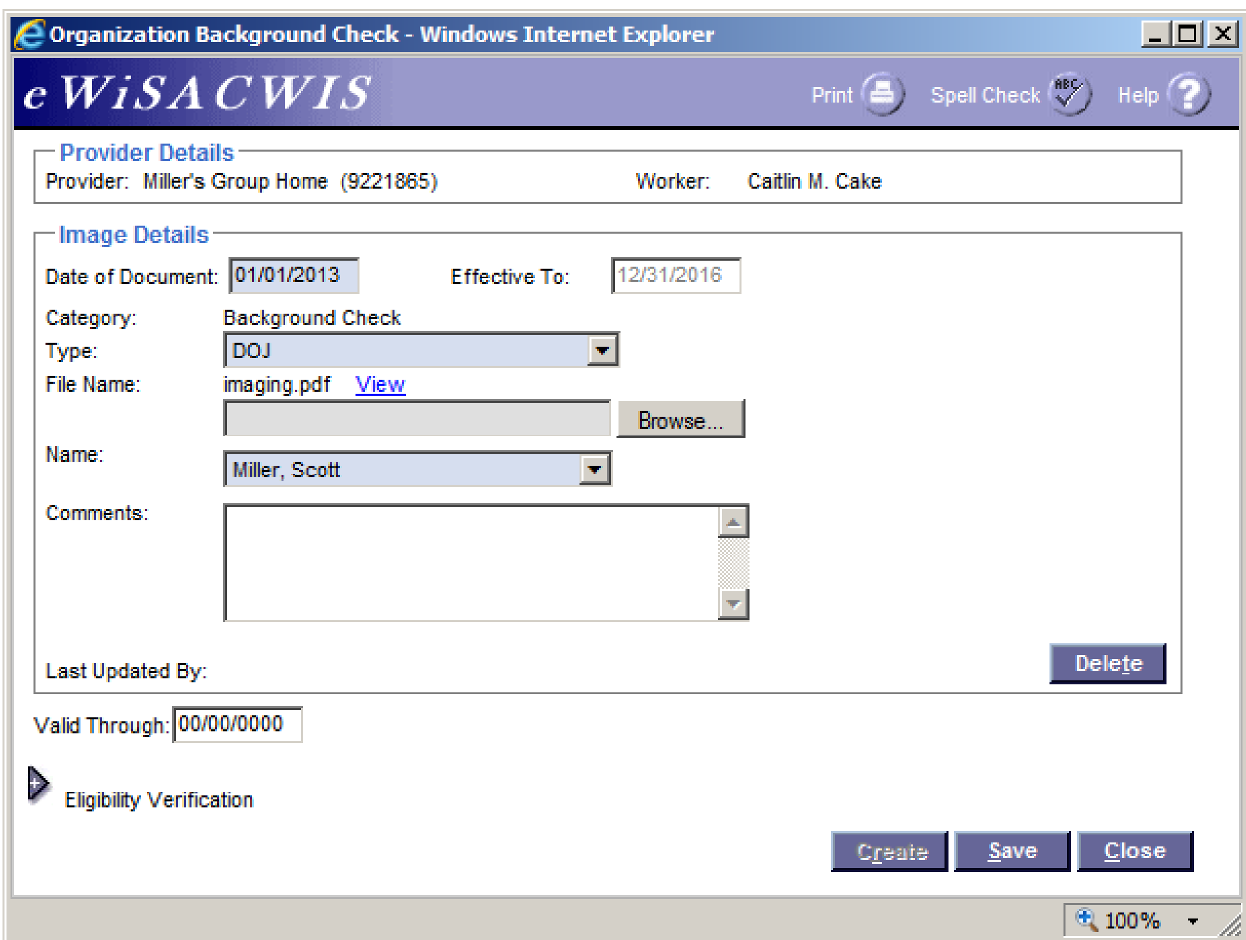
9. The Valid Through date identifies when a background check is no longer applicable or effective when the date is prior to the Effective To date. The date is used in revoked or closed license scenarios.

10. When all required fields have been completed, click Save. After clicking Save, your name will appear in the Last Updated By field.

11. If the background check has been added to the wrong provider, click Delete to remove the image. If the background check has been added to the wrong person, you can select a different name from the name drop-down.

12. At this point, you can add a new background check for this provider by selecting the Create button. By clicking the Create button, this will open the Organization Background Check page with the same Category selected.

13. Click Close to return to the Imaging Search page.



14. The Imaging Search page will display all scanned background checks for the provider. To view the image for a particular result, click on the blue hyperlink in the File Name column to access the scanned document directly, or click the Edit hyperlink to access the Organization Background Check page. To add additional background checks documents, repeat the above steps.